Space Survey 2012

Overarching Guidelines for the Space Survey

- The space survey is not a scientific or an exact process – there are not right or wrong answers. The information collected should be representative and reasonable.
- The goal of the space survey is to have a basis/support for functionalizing the room—this is done by having documentation of the room’s use. This can be supported by knowing:
  - Main occupant/user of the room
  - Additional individuals that may have used the room over the fiscal year
  - Funding support for those individuals performing activities in that room
  - Types of activities conducted in the room
- The function cannot be determined just by looking at the space.
- The function cannot be determined solely by how someone is paid because you are certifying 100% of the space use - it may include unpaid individuals and some faculty/staff have multiple offices.
- It is generally the case that several functions are performed in the same space.
- Start with assigning space that you are more familiar with to increase your experience in navigating the WebSpace system.

Practical Guidelines for Completing the Space Survey

- A communication about the space survey will be distributed to Department Heads from the DFA and/or Dean of the College.
- Work with your Department Head to send a communication about the space survey to the School’s faculty and staff.
- Work with the individual managing space in your unit (building deputy, etc.) to identify the occupants of each room or research lab. Varying levels of detail will be available within each academic unit. Utilize the information gathered to pre-assign as much information as possible.
- Ensure that you have access to the appropriate unit(s) in WebSpace.
- Begin the WebSpace inventory process by adding the PI/PO for each research focused lab or room and adding the occupant for other office rooms.
- Office space occupied by business offices, computing groups, building deputy, schedule deputy, assistant to the head, and other administrative positions should be identified and generally functionalized as 100% department administration. While office space occupied by the department head will generally have a large percentage assigned to departmental administration, there may also be space allocated to OIA (development), DR, INS, and/or OR depending on the specific Department Head.
- Office space occupied by Development Office staff would be functionalized as 100% OIA (Other Institutional Activities).
- Only certify to OR, DR, OSP, INS, OIA, DA, VAC, NA, SPA, and SS. There are other categories listed in WebSpace.
- Fellowships should be coded as DR (not OR), with all other functions continuing to be captured based on the space.
The following processes outline one approach to working with large research portfolio faculty and small research portfolio faculty to certify space. Each unit will adopt a specific process to meet their needs.

**Process for working with large research portfolio faculty:**
1. Send pre-meeting e-mail to faculty researcher. The e-mail should contain the following details.
   a. Send list of rooms assigned to PI. Are there any rooms or labs assigned to you that are not included? Is the listed room type accurate?
   b. Send list of PI’s research assistants and other employees to PI. Are all your graduate students/employees listed?
   c. Provide the definition of a room cluster. Does any of your space meet the cluster definition?
   d. Request to schedule time (30-60 minutes) to meet with PI.
2. Meet with faculty researcher.
   a. Bring laptop or have computer available for the meeting. Walk through the WebSpace space assignment process for each room assigned to faculty researcher.
      i. Assignment of occupants (post-docs, graduate students, technicians, etc.)
      ii. Assign the % time spent in room by each occupant
      iii. Assign the % functional percentages for room by each occupant
      iv. For Organized Research (OR) and Other Sponsored Programs (OSP) assign account % information for each employee.

**Process for working with small research portfolio faculty:**
Follow steps outlined in working with a large research portfolio faculty. Offer to schedule a meeting with faculty, but indicate that it can be completed through e-mail if preferred.

1. Send e-mail to faculty researcher. The e-mail should contain the following details.
   a. Send list of room(s) assigned to PI. Are there any rooms or labs assigned to you that are not included? Is the listed room type accurate?
   b. Ask questions to determine:
      i. Assignment of occupants (post-docs, graduate students, technicians, etc.)
      ii. Assignment of the % time spent in room by each occupant
      iii. Assignment of the % functional percentages for room by each occupant
      iv. For Organized Research (OR) and Other Sponsored Programs (OSP) assignment of the account % information for each employee.
**Other resources that may be useful**

- Other individuals in your School may be able to offer assistance. If beneficial, resources may be able to assist in the following ways:
  - Identify occupants/users of a room or research lab (building deputy, grad coordinator)
  - Indicate research groups/types of research going on in the department (assistant department head or assistant to the head)
  - Knowledge of graduate staff and their activities (grad chair, assistant to the head)
  - Knowledge of the teaching assignments for faculty/grads (department head, assistant head, coordinator)
  - Other (facilities manager, research coordinator, grad coordinator)

**Allocation of specific types of space**

**Research Labs Space**

- Certification is for activities occurring in that room. An individual may occupy a multiple rooms or a few individuals may share a room. Space should be certified based on the activities occurring in that space.
- Your starting point could be 100% organized research, but reductions should be considered if space was utilized occasionally for teaching activities, utilized partially for departmental research and/or occupied by the following.
  - Visiting scholars or adjunct faculty
  - Emeritus faculty
  - Unfunded graduate or undergraduate students
  - Fellowship occupant
  - USDA Scientist occupant

**Office Space**

- Office space occupied by department heads, computing groups, building deputy, schedule deputy, assistant to the head, and other administrative positions should be identified and generally functionalized as 100% department administration, unless there are other functions being performed in that space.
- Office space occupied by Development Office staff would be functionalized as 100% OIA (Other Institutional Activities).
- Office space used solely by grad teaching assistants/lecturers can be functionalized as 100% instruction, unless there are other functions being performed in that space.
- For other faculty/administrative occupants, effort reporting data can be a starting point for determining the functional use of their space. Adjustments should be considered if their teaching activities (if any) occur in a classroom elsewhere or their research activities (if any) are conducted largely in a research lab.
Recharge Center Space
- Use the Edit Room function to mark it as a recharge and then chose the reason “Designate as a Recharge”. The Costing Department will then follow up with all recharge related rooms at a later date.

Vacant Space
- Space not used for the entire year should be excluded from the study. If the space was used for a portion of the year, functionalize the space as it was used during that timeframe. Assign occupant as “Vacant” and functionalize as 100% vacant.

Copier and Printer Rooms
- Copier and Printer rooms for general use by the department should be certified as departmental administration.

Common Areas
- Common areas like restrooms, main hallways, and break-rooms should be identified as such so that they may be treated appropriately in the cost study. It is not necessary to functionalize this space.

Conference Rooms
- Conference rooms will be allocated based on total departmental space. This space was excluded from the preliminary space data and departmental functionalization is not necessary. If conference room space was loaded to WebSpace, then work with costing to exclude.

Leased Space
- Space leased in buildings not owned by Purdue University, including space leased from Purdue Research Foundation, is not included in the cost study and therefore it is not necessary to functionalize this space. Discuss unique questions with your Director of Financial Affairs or Costing.

Animal Space
- Animal space is functionalized based upon the specific type of room.
  - Animals not removed from the animal care facility (OR, DR)
  - Animals removed from the animal care facility, taken to the labs for research procedures (OIA)
  - Procedure rooms (OR, DR)
- Laboratory space should be allocated proportionally to the activities performed in the room
  - Animal breeding rooms (OIA)
  - Cage washing, food storage, receiving areas (OIA)
  - Locker rooms, showers (OIA)

Greenhouse Space
- Users of the greenhouse - manager/director of the greenhouse can assist with space functionalization.
Audit and Review Process

Review process steps while actively completing the space survey

- Are all the rooms used by my department listed in WebSpace?
- Are there rooms listed in WebSpace that were not used by my department?
- Have I considered if space is being occupied/used by graduate and undergraduate students? Visiting Scholars? Adjunct or Emeritus Faculty? Other individuals?

Review process steps at completion of the space survey

- Run the “Rooms Not Surveyed” report to ensure completion.
- Run the “Occupants Identified/Not Identified” report.
  - Are all staff paid assigned to at least one room?
    - A non-assignment would be okay if someone was on an off-campus research leave or sabbatical leave for the entire 2011-12 fiscal year. A non-assignment would also be okay if someone was working in an off-campus leased research space.

- Run the “Survey Summary by Department/Principal Investigator/Primary Occupant” report.
  - Do I have rooms that are categorized as 100% organized research rooms? If so, do I have strong justification for that allocation?

- Run the “Accounts Used/Not Used” report.
  - Are all sponsored or organized research accounts assigned to at least one room? If not, then review effort on account and determine room usage.
  - If the account is considered an “off campus” activity, then it does not need to be assigned to a room. For example, an account used solely at an off-campus leased research space.